

# CAREWare v5.0, build 713

## New User Training Module for Part B



*Maine Center for Disease  
Control and Prevention*

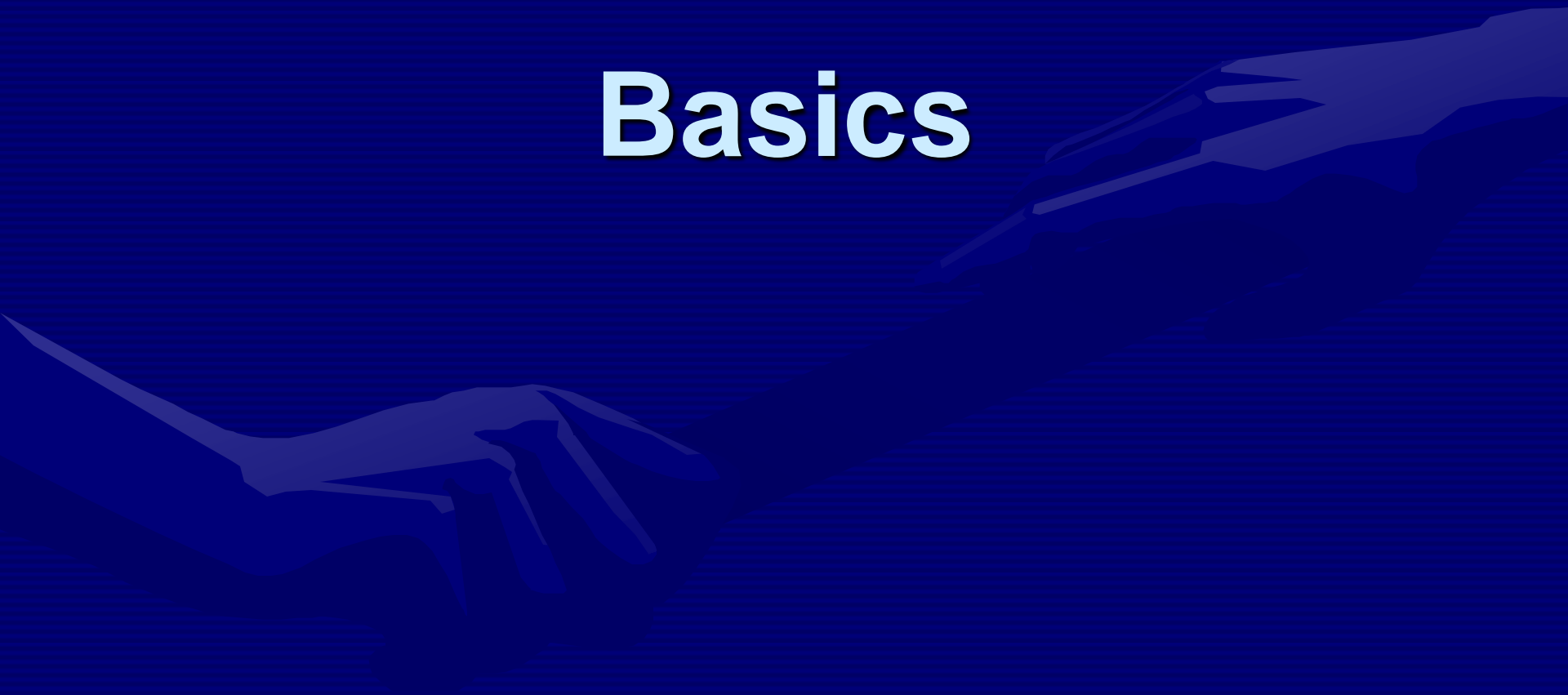
*An Office of the  
Department of Health and Human Services*

*Paul R. LePage, Governor*

*Mary C. Mayhew, Commissioner*

Updated 4/12/13

# Basics



# What is CAREWare?

- CAREWare is a free HIV data system developed by the Health Resources and Services Administration (HRSA) for organizations funded by what used to be known as the Ryan White CARE Act.
- CAREWare was created for the purpose of generating the annual Ryan White Services Report (RSR) to HRSA.
- CAREWare has been adapted to include case notes and other features that make it worth using for purposes other than generating the RSR.

# Why do we use CAREWare?

- CAREWare allows us the ability to link the HIV case management data in the state, to get an unduplicated count of clients and services in Maine.
- By having all Ryan White providers in the state using the same system, we will be able to generate more accurate reports on people living with HIV in Maine who are in care and/or case management, including clinical and social services data.
- This allows Part B and Part C organizations to share information (with appropriate releases) on the clients they have in common – case managers can view lab results entered by the Part C medical provider or Part C providers can see how alternative therapy funds were spent by the Part B programs they fund.



# How is data shared?

- We are able to set up certain user permissions, to reduce the risk of accidentally editing or deleting important data. Access to certain data can also be restricted.
- Providers serving the same client will automatically see shared demographic data.
- Providers serving the same client must request permission to view service and/or clinical data. The other provider has to grant the request before data is shared. **Permission should only be granted if a release is on file.**
- Data sharing can be turned off after it is granted.
- Case notes will never be shared among providers.

# Accessing CAREWare

- In order to access CAREWare, you must have a SecurID card from the state. Before proceeding with this training, please make sure that you have submitted the appropriate paperwork and have received and activated your SecurID card.
- Once you have a SecurID, you will need a CAREWare user account. If one has not been created for you, please contact the Database Administrator.
- Database Administrator: Tara Thomas  
287-5199  
[tara.thomas@maine.gov](mailto:tara.thomas@maine.gov)

# Logging In



# State Server

- You should have an icon on your desktop labeled “CAREWare Server Connection.” Double click on this icon.
  - If you don’t have the shortcut, just go to this web site:  
<https://secure.maine.gov>
- A web site that looks like the graphic below will open:

Welcome to the  
**State of Maine Remote Access Service**

Active Directory User Name

Password

SecureID card user  
please enter your  
PIN/Passcode here \*soft  
token users\* Please do  
not enter your PIN, just  
the copied 8 digit  
passcode.

This is a State of Maine Government Computer System. This computer system and all related equipment and networks -- including access to the Internet -- are provided only for authorized State of Maine Government use. These systems may be monitored for all lawful purposes, including protecting against unauthorized use, verifying specific security procedures, and ensuring the security, performance and survivability of the computer system and the state's computer network.

All information, including personal information, placed on or sent over this system may be monitored. Evidence of unauthorized use collected during monitoring may be used for administrative, criminal or adverse action. Use of this system constitutes consent to monitoring for these purposes.

**This new sign-in page requires that your SecurID name match your Active Directory name for you to properly sign-in. Please call OIT Customer Support at 624-7700 and they will assist you in getting this changed done. Please call them with any other problems as well. If you need to get on before you can get your SecurID name changed, you can go to [secure.maine.gov/outsideuser](https://secure.maine.gov/outsideuser)**

# State Server, cont.



Active Directory User Name

Password

SecureID card user please enter your PIN/Passcode here \*soft token users\* Please do not enter your PIN, just the copied 8 digit passcode.

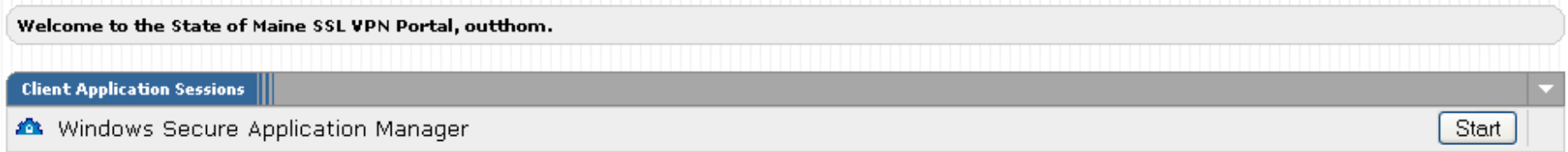
Sign In

- ← Enter the username you were assigned for your SecurID
- ← Enter the password you were assigned for your SecurID
- ← Enter the 4-digit PIN you were assigned when you activated your SecurID, followed by the numbers displayed on the SecurID card at that moment (no spaces)

Click the "Sign In" button

# State Server, cont.

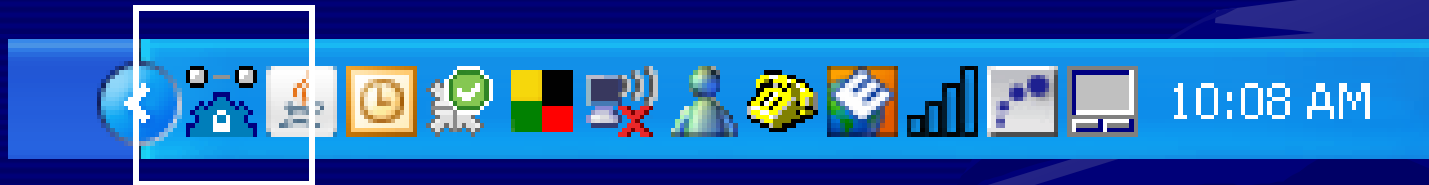
You will go to a web page that looks like the graphic below:



Click the button labeled "Start"

# State Server, cont.

You will notice a small connection icon in your task bar, near the clock:



Minimize your web browser by clicking the minus sign in the upper right corner of your screen:



# Logging in to CAREWare

Back on your desktop, double click the icon labeled “Run RW CAREWare 4.1.” You will be taken to the CAREWare login screen:

The image shows a screenshot of the RW CAREWare Login window. The window has a blue title bar that says "RW CAREWare Login". Inside the window, at the top, is the text "Department of Health and Human Services" above the "HRSA" logo, which consists of a stylized diamond shape with the letters "HRSA" in bold. Below the logo is the text "Health Resources and Services Administration". In the center of the window, the text "RW CAREWare" is displayed in a large, bold, black font. Below this, "Version 5.0" and "Build 713" are shown in a smaller font. At the bottom of the window, there are two input fields: "User Name:" followed by a text box, and "Password:" followed by a text box. Below the input fields are three buttons: "Login", "Cancel", and "Options>>".

RW CAREWare Login

Department of Health and Human Services

**HRSA**

Health Resources and Services Administration

**RW CAREWare**

Version 5.0  
Build 713

User Name:

Password:

Login Cancel Options>>

When you log in to CAREWare, you will need to enter your CAREWare username and CAREWare password, which expires every 90 days.



# CAREWare Passwords

- Must be alphanumeric (letters and at least two non-letters) and 8 characters long.
- Expire every 90 days; you may alternate between two different passwords.
- If you lose your password, only the Database Administrator can reset it for you, so it is **very important** that you keep a written record of your password in a secured location.

# Software Updates

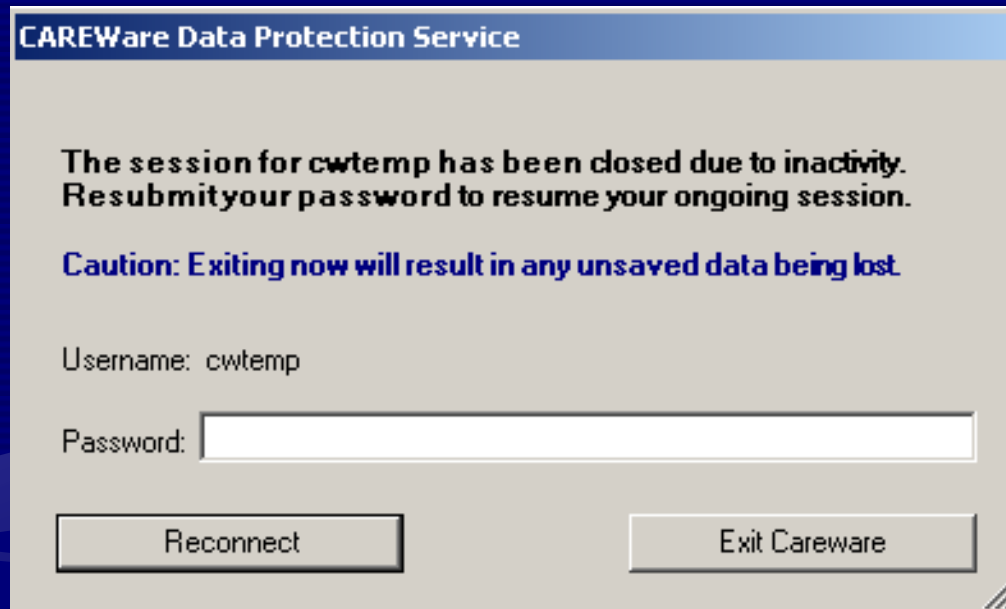
When the system is updated, you will be prompted to update your CAREWare when you log on, by a screen that looks like this:



After updating, you'll be returned to the login screen to login again, now using the latest version.

# Timeouts

For security reasons once CAREWare is running, your session can only remain inactive for 30 minutes. If you get up from your desk and leave CAREWare running, you'll come back to find this message:



A screenshot of a Windows-style dialog box titled "CAREWare Data Protection Service". The dialog has a light gray background and a blue header bar. The text inside reads: "The session for cwtemp has been closed due to inactivity. Resubmit your password to resume your ongoing session." Below this, a caution message in blue text says: "Caution: Exiting now will result in any unsaved data being lost." Further down, it shows "Username: cwtemp" and a "Password:" label next to a white text input field. At the bottom, there are two buttons: "Reconnect" on the left and "Exit Careware" on the right.

CAREWare Data Protection Service

The session for cwtemp has been closed due to inactivity.  
Resubmit your password to resume your ongoing session.

Caution: Exiting now will result in any unsaved data being lost.

Username: cwtemp

Password:


Reconnect Exit Careware

Re-entering your password and clicking **Reconnect** will take you back to the screen you were working on before your session became inactive.

# Main Menu

## Main Menu

Department of Health and Human Services



Health Resources and Services Administration

Add Client

Find Client

Reports

Drug Inventory System

Appointments

Orders

Administrative Options

My Settings

Rapid Service Entry

Log Off

Exit

### System Messages

[User Messages](#)

[About CAREWare](#)

[Refresh Messages](#)

# Adding Clients

**\*\* This permission is restricted to  
certain users**

# Add Client

Select "Add Client" from the main menu and the following box will appear:

**Add Client**

Last Name:

First Name:

Middle Name:

Gender:

BirthDate:  ☐ Estimated?

☐ Forms

Generated URN:

# Clients Already in CAREWare

- If the client is already in the system (because he or she received services elsewhere or because the client's name, gender, and birth date closely match another client in the system) a warning box like this will appear:

**Possible Duplicate Client List**

The new client information you have entered generates a unique record number that is shared by at least one existing client. View the details of the possible matching client(s) listed below to determine whether or not the client you are entering is really a new client.

Last Name:	First Name:	URN:
Puck	Hockey	HCPC0128821U

< ||| >

[View more information about the selected client.](#)

[Cancel the add client process.](#)

# Viewing More Information

## Possible Duplicate Client Information.

### URN Fields:

First Name:

Hockey

Middle Name:

Last Name:

Puck

Date of Birth:

1/28/1982

Gender:

Male

URN:

HCPC0128821U

### Address Fields:

Address:

123 Main St

City:

Portland

State:

Maine

County:

Cumberland

Zip Code:

04101-

Phone Number:

207-774-6877

### Ethnicity:



Hispanic



Non-Hispanic



Unknown

### Race

☒ White

☐ American Indian or Alaska Native

☐ Other

☐ Black or African American

☐ Native Hawaiian or Other Pacific  
Islander

☐ Unknown

☐ Asian

[Return](#) to the list of possible matches to view another client.

[This](#) is the client I was attempting to add. Continue to client screen.

The client I am adding is not on the list. Create a [new](#) client record.

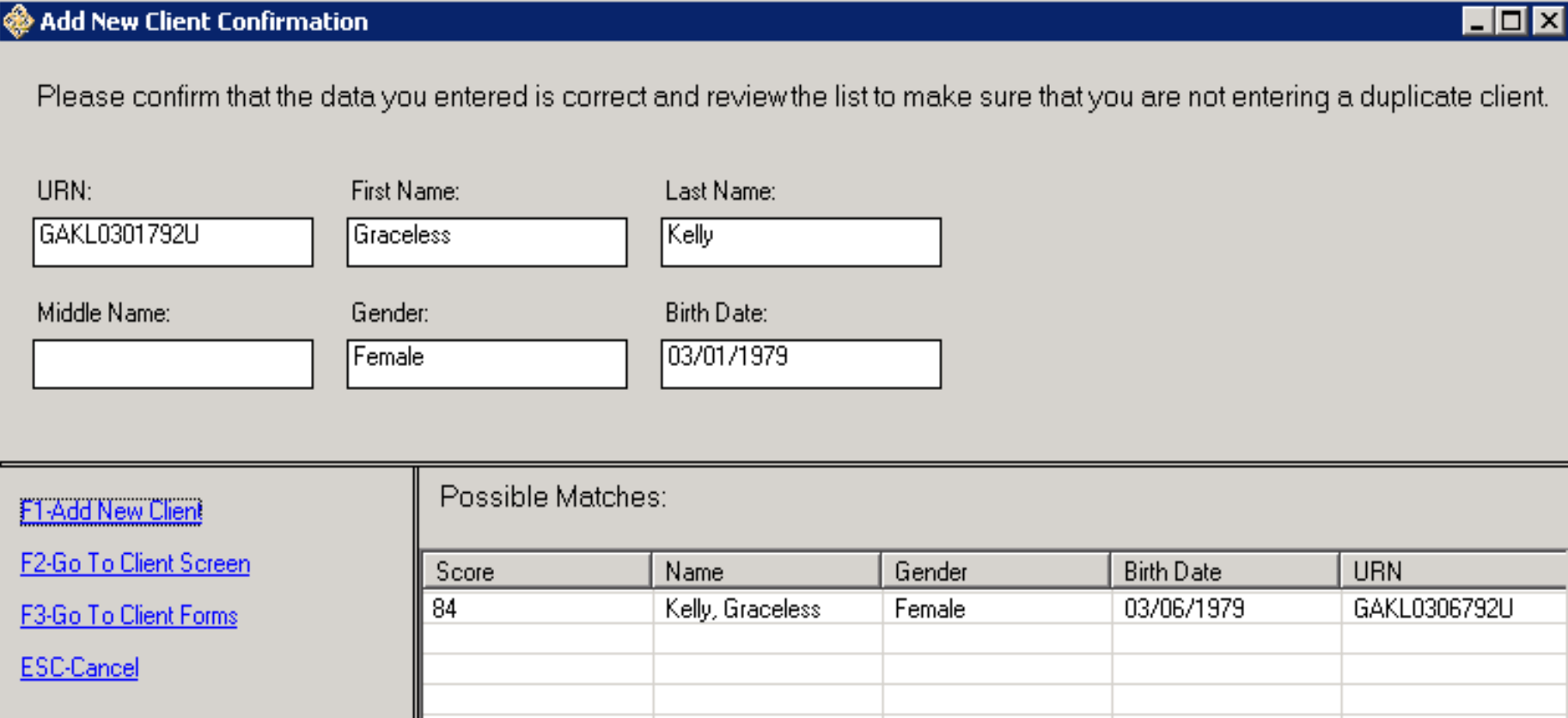


# Disclosure Log

- If you view information on a person who is not actually a client of your program, you must log information viewed
- Disclosure log must include:
  - Date info viewed
  - Name of the person identified
  - Description of the information viewed
  - Reason why the information was viewed
  - Name of the person who viewed the information
- The log must be kept in a secure location for 7 years
- The database administrator must also be alerted when such a disclosure has occurred

# Clients Already in Your System

- If the client is already in your system (because he or she has been discharged from your services or because the client's name, gender, and birth date closely match another client you served) a warning box like this will appear:



**Add New Client Confirmation**

Please confirm that the data you entered is correct and review the list to make sure that you are not entering a duplicate client.

URN:  First Name:  Last Name:

Middle Name:  Gender:  Birth Date:

[F1-Add New Client](#)  
[F2-Go To Client Screen](#)  
[F3-Go To Client Forms](#)  
[ESC-Cancel](#)

Possible Matches:

Score	Name	Gender	Birth Date	URN
84	Kelly, Graceless	Female	03/06/1979	GAKL0306792U



## Add New Client Confirmation

Please confirm that the data you entered is correct and review the list to make sure that you are not entering a duplicate client.

URN:

GAKL0301792U

First Name:

Graceless

Last Name:

Kelly

Middle Name:

Gender:

Female

Birth Date:

03/01/1979

[F1-Add New Client](#)

[F2-Go To Client Screen](#)

[F3-Go To Client Forms](#)

[ESC-Cancel](#)

Possible Matches:

Score	Name	Gender	Birth Date	URN
84	Kelly, Graceless	Female	03/06/1979	GAKL0306792U

Click this option if client is not a duplicate, but a new client with closely matching info.

Select client name, then click this option if client should be matched to the record already in the system.

# Confidentiality

- Adding clients is the only time you can “preview” data on someone in the system who is not already in your provider database
- All users who can add clients have to sign a special confidentiality agreement
- If you view data on someone who is not a client of yours, you must document the incident and notify the database administrator ASAP

# Last Names

- Include apostrophes as appropriate
  - Ex. O'Brien
  - not Obrien
- It is very important to do this, because the UCI – the code that determines whether or not a client record is unique in the database (and nationally) can be affected if we are not all entering data the same way

# Suffixes

- Always include a comma after the last name
  - Ex. John Smith, III
  - not John Smith III
- Include a period when the suffix is an abbreviation
  - Ex. John Smith, Jr.
  - not John Smith Jr. or John Smith, Jr
- We must enter these data consistently, so that data can be matched appropriately if/when it is imported into the system (from EMRs or other data systems)

# Verify Information

- Make certain you are entering the correct date of birth
  - The majority of incorrect duplicates in the system have been created because of incorrect dates of birth
- Make certain you have the correct middle initial
  - Records being imported (from EMRs, etc) may not match up if the middle initials are different

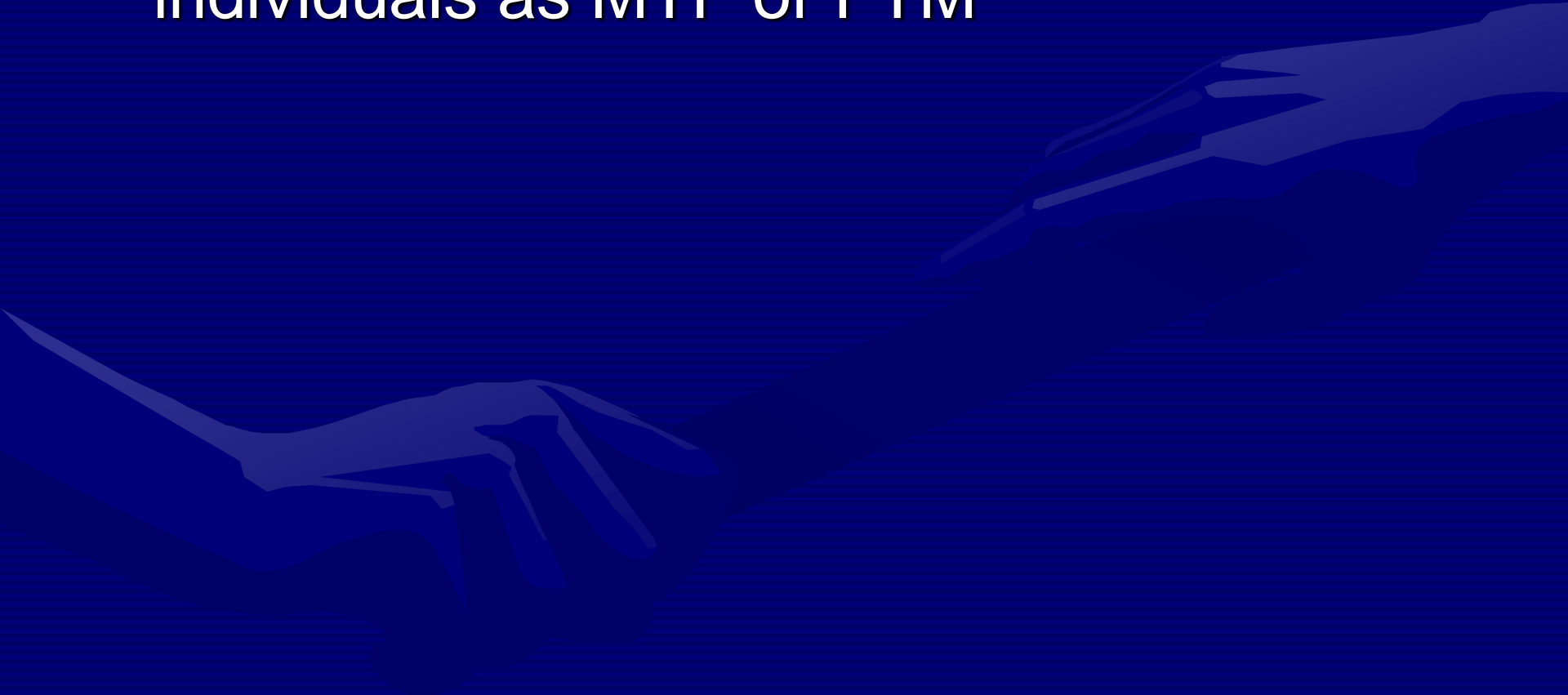
# Legal Name

- Remember to always use the full, legal name
- You can enter nicknames in the “Common Notes” box



# Transgender Subgroup

- HRSA asks us to classify transgender individuals as MTF or FTM



# Important Data to Remember

- You must enter an enrollment date for all new clients on the Service screen
  - HRSA uses this data to determine if a client is new or not
- Always update the CM assigned and/or Part C on the QA screen

# Using CAREWare

# Find Client

## Find Client

Enter search criteria. Partial matches will be accepted.

Case Managers can access their entire caseload by selecting their names from this dropdown box.

Last Name:

CM assigned

First Name:

You can search by full first or last names, or just initials

Client ID:

When searching by ID, make sure you enter the entire ID as listed in CAREWare. If the ID begins with zeroes, these must be included.

Client URN:

ADAP ID

URN stands for Unique Record Number.

☒ View Active Clients Only

If you need to look for a client who has been discharged, you must uncheck this box first.

10000000

Search

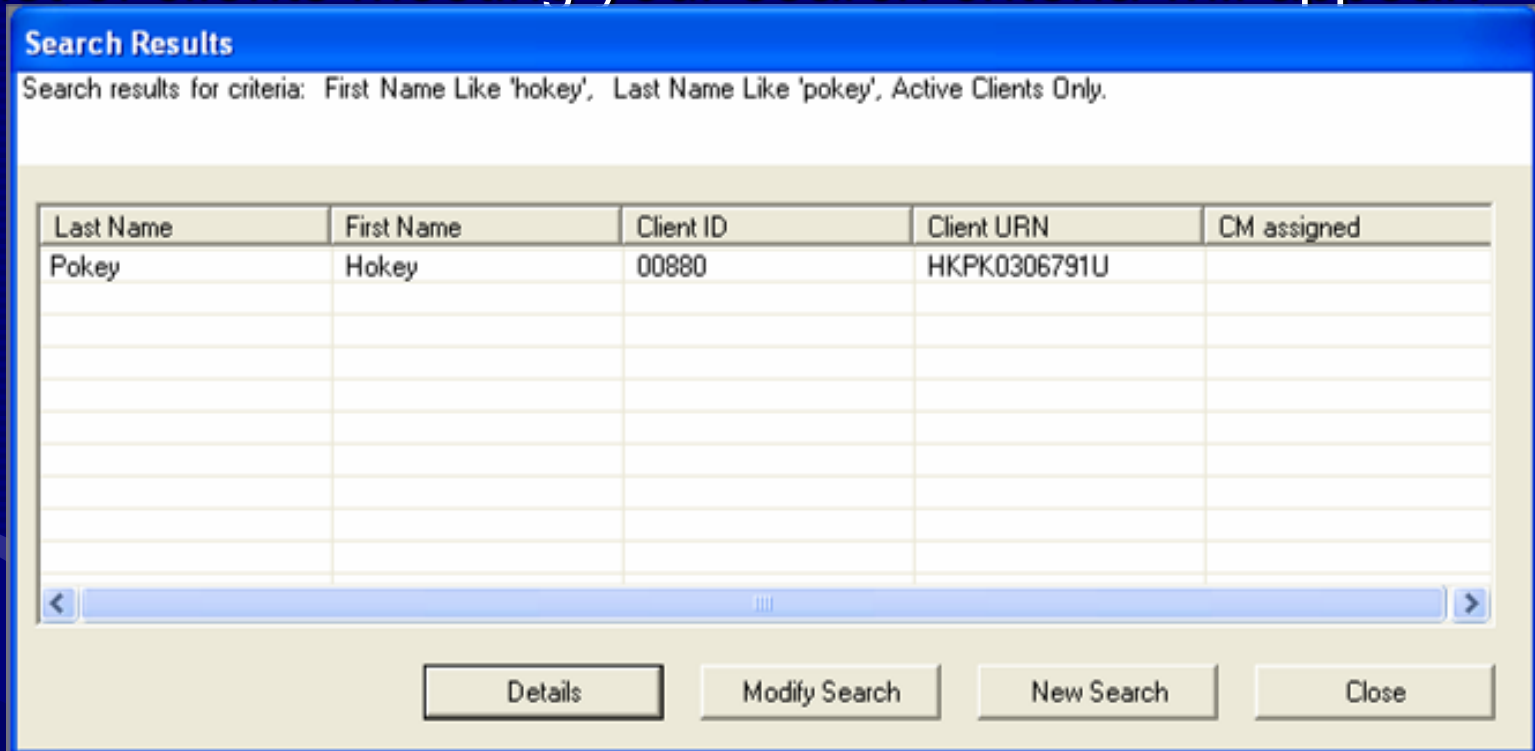
Cancel

# Known bugs as of 2/15/13

- There is a bug in the upgrade installed 2/15/13 that causes searches by custom fields (like CM assigned, Part C, etc) to malfunction
- The bug also makes it impossible to sort the search results by those custom fields
- You can still reliably search by client ID, ADAP ID, and MaineCare number

# Find Client, cont.

- Once you have entered your search criteria, click the box labeled “Search” or hit the “Enter” button on your keyboard.
- A list of clients meeting your search criteria will appear:



The screenshot shows a window titled "Search Results" with a subtitle "Search results for criteria: First Name Like 'hokey', Last Name Like 'pokey', Active Clients Only." Below the subtitle is a table with five columns: Last Name, First Name, Client ID, Client URN, and CM assigned. The first row of the table contains the values "Pokey", "Hokey", "00880", "HKPK0306791U", and an empty cell. Below the table is a horizontal scrollbar. At the bottom of the window are four buttons: "Details", "Modify Search", "New Search", and "Close".

Last Name	First Name	Client ID	Client URN	CM assigned
Pokey	Hokey	00880	HKPK0306791U	

- To open the client's record, select the client and double click on the client's name or click the “Details” button. If you want to find someone else, click the “New Search” button.

# Demographics

Demographics	Services	Annual Review	Encounters	Relations	QA	Income Verification	Releases	Housing Status	Scheduler
--------------	----------	---------------	------------	-----------	----	---------------------	----------	----------------	-----------

First Name: <input type="text" value="Hokey"/>	Middle Name: <input type="text"/>	
Last Name: <input type="text" value="Pokey"/>	Date of Birth: <input type="text" value="3/6/1979"/> <input type="button" value="▼"/> <input type="checkbox"/> Est?	
Gender: <input type="text" value="Male"/> <input type="button" value="▼"/>	Client URN: <input type="text" value="HKPK0306791U"/> <input type="button" value="..."/>	Encrypted URN: <input type="text" value="5kzVa4N7L"/>

Ethnicity		
<input type="radio"/> Hispanic	<input checked="" type="radio"/> Non-Hispanic	<input type="radio"/> Unknown
Race		
<input checked="" type="checkbox"/> White	<input type="checkbox"/> American Indian or Alaska Native	<input type="checkbox"/> Other
<input checked="" type="checkbox"/> Black or African American	<input type="checkbox"/> Native Hawaiian or Other Pacific Islander	<input type="checkbox"/> Unknown
<input type="checkbox"/> Asian		

Client ID: <input type="text" value="00880"/>	Address: <input type="text" value="335 Valley St"/>	City: <input type="text" value="Portland"/>
State: <input type="text" value="Maine"/> <input type="button" value="▼"/>	Zip Code: <input type="text" value="04102-"/>	
County: <input type="text" value="Cumberland"/> <input type="button" value="▼"/>	Phone Number: <input type="text" value="207-774-6877"/>	<input checked="" type="checkbox"/> Include on label report

Common Notes	Provider Notes	Case Notes
<div><div></div></div>		

HIV Status: <input type="text" value="CDC defined AIDS"/> <input type="button" value="▼"/>	HIV+ Date: <input type="text" value="11/1/2006"/> <input type="button" value="▼"/> <input checked="" type="checkbox"/> Est?	AIDS Date: <input type="text" value="12/14/2006"/> <input type="button" value="▼"/> <input type="checkbox"/> Est?
--	---	---

HIV Risk Factors		
<input checked="" type="checkbox"/> Male who has sex with male(s)	<input type="checkbox"/> Heterosexual contact	<input type="checkbox"/> Receipt of transfusion of blood, blood components, or tissue
<input checked="" type="checkbox"/> Injecting Drug Use	<input type="checkbox"/> Perinatal Transmission	<input type="checkbox"/> Other, specify: <input type="text"/>
<input type="checkbox"/> Hemophilia/coagulation disorder	<input type="checkbox"/> Undetermined/unknown, Risk not reported or identified	

# Changes in Contact Info

Demographics	Services	Annual Review	Encounters	Relations	QA	Income Verification	Releases	Housing Status	Scheduler
<p>First Name: <input type="text" value="Hokey"/> Middle Name: <input type="text"/></p> <p>Last Name: <input type="text" value="Pokey"/> Date of Birth: <input type="text" value="3/6/1979"/> <input type="checkbox"/> Est?</p> <p>Gender: <input type="text" value="Male"/> Client URN: <input type="text" value="HKPK0306791U"/> Encrypted URN: <input type="text" value="5kzVa4N7L"/></p>						<p>Ethnicity</p> <p><input type="radio"/> Hispanic <input checked="" type="radio"/> Non-Hispanic <input type="radio"/> Unknown</p> <p>Race</p> <p><input checked="" type="checkbox"/> White <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Other</p> <p><input checked="" type="checkbox"/> Black or African American <input type="checkbox"/> Native Hawaiian or Other Pacific Islander <input type="checkbox"/> Unknown</p> <p><input type="checkbox"/> Asian</p>			
<p>Client ID: <input type="text" value="00880"/> Address: <input type="text" value="335 Valley St"/> City: <input type="text" value="Portland"/></p> <p>State: <input type="text" value="Maine"/> Zip Code: <input type="text" value="04102-"/></p> <p>County: <input type="text" value="Cumberland"/> Phone Number: <input type="text" value="207-774-6877"/> <input checked="" type="checkbox"/> Include on label report</p>						<p>Common Notes <input type="text"/> Provider Notes <input type="text"/> Case Notes <input type="text"/></p> <div><p><b>If you change the client's address, make a dated note here, so other providers know the address is new.</b></p></div>			
<p>HIV Status: <input type="text" value="CDC defined AIDS"/> HIV+ Date: <input type="text" value="11/1/2006"/> <input checked="" type="checkbox"/> Est? AIDS Date: <input type="text" value="12/14/2006"/> <input type="checkbox"/> Est?</p>									
<p>HIV Risk Factors</p> <p><input checked="" type="checkbox"/> Male who has sex with male(s) <input type="checkbox"/> Heterosexual contact <input type="checkbox"/> Receipt of transfusion of blood, blood components, or tissue</p> <p><input checked="" type="checkbox"/> Injecting Drug Use <input type="checkbox"/> Perinatal Transmission <input type="checkbox"/> Other, specify: <input type="text"/></p> <p><input type="checkbox"/> Hemophilia/coagulation disorder <input type="checkbox"/> Undetermined/unknown, Risk not reported or identified</p>									



# Known bugs as of 2/15/13

- There is a bug in the current build that makes it so anything entered in “Provider Notes” is treated like “Common Notes”
- Do not enter confidential information here
- Do not enter information that cannot/should not be shared with all other providers in the state (i.e. ADAP, HOPWA, MaineCare, etc.)

# Demographic fields required for Part B reporting:

- Gender
- Date of Birth
- Ethnicity
- Race
- County and Zip Code
- HIV Status
- HIV Date/AIDS Date
- HIV Risk Factors

# Name, Address, Phone

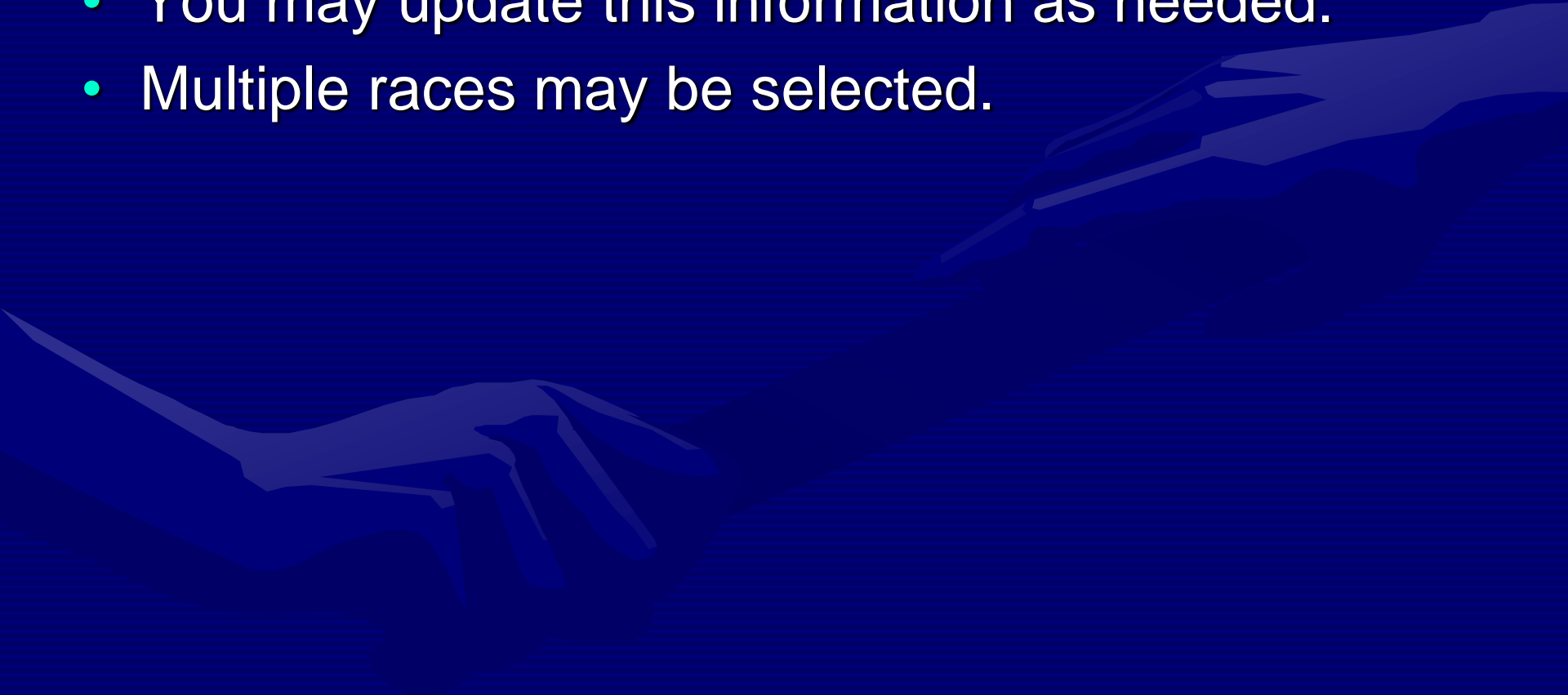
- The name fields should always contain the client's full legal name. If the client has a nickname, please enter that in the large "Common Notes" box on the demographic screen. If a client completes a legal name change, you may change this information directly in CAREWare (as long as your user account has permission to do so). If the client has not legally changed names, put the new name in the "Common Notes" box, as you would a nickname.
- Please update the address and phone number fields as necessary. **If you change your client's address, please make sure you update his or her county information.** You can look up counties by town using this website: [www.maine.gov/local](http://www.maine.gov/local)
- If the box labeled "Include on label report" has a checkmark in it, the client's name and address will appear on the "Mailing Labels" list from the Reports screen. If you do not want your client's information to appear on this report, do not check the box.

# HIV Status and Risk Factors

- The options for HIV status are: HIV-positive, not AIDS; HIV-positive (AIDS status unknown); and CDC-defined AIDS. If you select anything else, the client will be counted as HIV-negative in reporting. In order for a client to meet the CDC definition of AIDS, we must have written verification from a medical provider that the client has an AIDS diagnosis. **If this documentation is not on file (even if you know that the client has an AIDS diagnosis), the HIV status should be set to “HIV-positive, AIDS status unknown.”**
- Please note that date of initial HIV diagnosis and AIDS diagnosis should also be entered on this screen. These dates may be estimated.
- HIV risk factors may be updated at any time. Multiple risk factors may be selected.
- If a client states that he or she contracted HIV through heterosexual contact, that client must identify heterosexual contact with an at-risk partner (IDU, MSM, known HIV+), otherwise select “other” and specify “presumed het” in the comment field. Note that a client cannot have both heterosexual (at-risk) and presumed heterosexual risk factors.

# Ethnicity and Race

- All clients must have both an Ethnicity and at least one Race selected.
- You may update this information as needed.
- Multiple races may be selected.





# Ethnicity and Race

The following definitions apply to all Federal reporting:

- *White (not Hispanic)* is an individual having origins in any of the original peoples of Europe, the Middle East, or North Africa, but not of Hispanic ethnicity.
- *Black or African American (not Hispanic)* is an individual having origins in any of the black racial groups of Africa, but not of Hispanic ethnicity.
- *Hispanic or Latino(a)* is an individual of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.
- *Asian* is an individual having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- *Native Hawaiian or Other Pacific Islander* is an individual having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- *American Indian or Alaska Native* is an individual having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.

# Client Report

The screenshot shows the 'Client Information' window for a client named 'Pokey, Hokey'. The window has a blue header and a toolbar with buttons: 'Change Log', 'Client Report' (highlighted with a red box), 'Delete Client', 'Find List', 'New Search', and 'Close'. Below the toolbar are tabs for 'Demographics', 'Services', 'Annual Review', 'Encounters', 'Relations', 'QA', 'Income Verification', 'Releases', and 'Housing Status'. The 'Demographics' tab is active, showing fields for 'First Name' (Hokey), 'Middle Name' (empty), 'Last Name' (Pokey), and 'Date of Birth' (3/6/1979). To the right, there are radio buttons for 'Ethnicity' (Hispanic, Non-Hispanic, Unknown) and checkboxes for 'Race' (White, American Indian or Alaska Native, Other).

- From any screen in CAREWare, you may select the “Client Report.” When you click on this button, a box will appear like the one below:

The dialog box contains five buttons stacked vertically: 'Client Report (One Page)', 'Client Report (Two Page)', 'EncounterReport', 'HL7 Export', and 'Close'.

- The one-page report gives you a printout of the client’s demographic screen and annual information.
- The two-page report also adds information from the “Income Verification” and “Releases” screens.

# Case Notes

- **Note that even when demographic, service, and clinical data is shared between providers, case notes will always remain private and visible only to staff with appropriate permissions at the agency where the note originated.**
- You can access case notes from both the Demographics and Encounters screens. To access case notes from Demographics, click on the button labeled “case notes.”

The screenshot displays a software interface with a light beige background. At the top, there are three radio button options: 'Asian', 'Pacific Islander', and 'Unknown'. Below these, there are three tabs: 'Common Notes', 'Provider Notes', and 'Case Notes'. The 'Case Notes' tab is selected and highlighted with a black rectangular box. The 'Case Notes' tab contains a large, empty text area with a vertical scrollbar on the right side. At the bottom of the interface, there are two date fields: 'HIV+ Date: 11/1/2006' and 'AIDS Date: 12/14/2006'. Each date field has a dropdown arrow. To the right of each date field is an 'Est?' checkbox, which is checked for the HIV+ date and unchecked for the AIDS date.



# Case Notes, cont.

## Case Notes (Rapid Entry)

Client:

From:  Through:

☒ Only show this provider

[Templates](#) [Report](#)  
[Sharing](#) [Close](#)

Note:

Case notes always default to today's date. Make sure you enter the date for the contact before clicking "Add"

Date:

Author:

☒ Add Service

[Save](#)

Click "Add" to begin a new note.

Date:	Provider:	Case Note:	Author:
<p>Previously recorded case notes would appear in this box.</p>			

[Add](#)  
[Edit](#)  
[Append](#)  
[Delete](#)

# Case Notes, cont.

- There are two templates for each agency
  - Use the **General Contacts** template to document any contact with the client or on the client's behalf
  - Use the **Contacts NOT logged as services** template when you need to document an action that should not be logged as a service, such as leaving a message or sending a letter.
- **All case managers are required to use Part B-provided templates for case notes**
  - If you do not use CAREWare for your case notes, templates in MS Word can be e-mailed to you
- Spell check and a thesaurus are available for case notes

# Entering Case Notes

**Case Notes (Rapid Entry)**

Client:

From:  Through:

☒ Only show this provider

Note:

Please choose a case note template to paste to case note.

Template Name	Template Text
General Contacts	Care Plan goal: Description of encoun...
Contacts NOT logged as services	Left message for client. Will wait to hear ...

2. Select the appropriate template

Date:

Author:

☒ Add Service

1. Click "Paste Template" and the "Case Note Template Select" box will appear.

# Template for General Contacts

## Case Notes (Rapid Entry)

Client:

From:

Through:

[Templates](#)

[Report](#)

[Sharing](#)

[Close](#)

☒ Only show this provider

Note:

Care Plan goal:

Description of encounter:

Referrals made:

Follow up:

**Fill in the appropriate information.**

**Remember:**

- You are not the client's biographer
- Case notes are legal documents that may be subpoenaed
- Clients may review their records at any time

**Keep notes concise.**

**Never identify another individual's status in a client's notes.**

Date:

Author:

☒ Add Service

[Save](#)

[Cancel](#)

[Paste Template](#)

# Template for Contacts NOT Logged as Services in CAREWare

## Case Notes (Rapid Entry)

Client:

From:

Through:

[Templates](#)

[Report](#)

[Sharing](#)

[Close](#)

☒ Only show this provider

Note:

Left message for client. Will wait to hear back.

Left message for provider on behalf of client. Will wait to hear back.

Sent information by mail to client. Will wait to hear back.

**Delete the options that don't apply and add any necessary detail.**

Date:

Author:

☒ Add Service

[Save](#)

[Cancel](#)

[Paste Template](#)

# Entering Case Notes

## Case Notes (Rapid Entry)

Client:

From:

Through:

[Templates](#)

[Report](#)

[Sharing](#)

[Close](#)

☒ Only show this provider

Note:

Left message for client. Will wait to hear back.

Left message for provider on behalf of client. Will wait to hear back.

Sent information by mail to client. Will wait to hear back.

Date:

Author:

Casey, OQS, Margaret

Ouellette, OQS, Judy

Select your name  
from the "Author"  
list before saving

[Save](#)

[Cancel](#)

[Paste Template](#)

# Entering Case Notes

## Case Notes (Rapid Entry)

Client:

From:

Through:

[Templates](#)

[Report](#)

[Sharing](#)

[Close](#)

☒ Only show this provider

Note:

Left message for client. Will wait to hear back.

Left message for provider on behalf of client. Will wait to hear back.

Sent information by mail to client. Will wait to hear back.

When your note is complete:

1. Make sure "Add Service" is checked
2. Click "Save"

\*\* As soon as you click "Save," CAREWare will automatically bring you to a new Service entry on the Services screen.

Date:

Author:

☒ Add Service

[Save](#)

[Cancel](#)

[Paste Template](#)

# Entering Case Notes, cont.

- **Note: Permissions have been set so that case managers have the ability to edit case notes once they have been entered.**
- **See the next slide for the policy related to editing case notes.**





## **Ryan White Part B Program Program Operating Procedures and Standards**

### **Monitoring of Edited Case Notes in CAREWare**

Changes to client records in CAREWare may be monitored through the Change Log. This feature is accessible through any screen in the client record by clicking on the "Change Log" button at the top of the screen. Permissions to access the Change Log are restricted to the Database Administrator.

The change log shows changes made to the client record by date, user, provider domain, table name, client URN, record ID, and change details.

When a change is made to a case note, an entry is added to the change log for the Case Note table. The change details include the text of the original note and the text of the new note.

During routine desk audits each quarter, the database administrator will review change logs. Change logs may also be monitored at any time due to client request, troubleshooting and technical assistance, or other routine monitoring.

Any time change logs are reviewed, entries for the case note table will be scrutinized to ensure that case notes have not been altered inappropriately.

Appropriate changes to case notes:

- Correcting dates
- Correcting blanks in the case note template
- Completing notes that were accidentally saved prior to being completed
- Adding clearly identified addendums
- Adding the case manager name if inadvertently left out

Any case notes that have been altered inappropriately will be documented using the change log records and the case manager's case note editing privileges will be stripped.

# Printing Case Notes

## Case Notes (Rapid Entry)

Client:

☒ Only show this provider

From:  Through:

Templates

Sharing

Report

Close

Note:

Care Plan goal: Medication/Adherence

Description of encounter: Met with client at office to complete AA and MaineCare recertification.

Referrals made: Referred client to ID doctor to discuss questions about side effects.

Follow up: None at this time.

1. Enter the date range for the notes you want to print.

2. Click "Report."

Author:

☒ Add Service

Save

Cancel

Paste Template

Date:	Provider:	Case Note:	Author:
3/26/2010	Community Health and Counseli...	Care Plan goal: Medication/Adh...	Casey, OQS, Margaret
3/26/2010	Community Health and Counseli...	Left message for client. Will wait...	Ouellette, OQS, Judy

Add

Edit

Append

Delete

# Printing Case Notes, cont.

**RW CAREWare Report Viewer**

File

Print... 100 % 1/1 Backward Forward

3. Click here to print your case note report.

**Case Notes**

Client:	Testrecord, Test	From:	Through:
URN:	TSTS0306791A	3/26/2009	3/26/2010

---

<b>Date:</b>	<b>Provider:</b>	<b>Author:</b>
03/26/2010	Community Health and Counseling Services	Casey, OQS, Margaret

**Case Notes:**

Care Plan goal: Medication/Adherence

Description of encounter: Met with client at office to complete ADAP recertification and MaineCare recertification.

Referrals made: Referred client to ID doctor to discuss questions about side effects.

Follow up: None at this time.

---

<b>Date:</b>	<b>Provider:</b>	<b>Author:</b>
03/26/2010	Community Health and Counseling Services	Ouellette, OQS, Judy

**Case Notes:**

Left message for client. Will wait to hear back.

Left message for provider on behalf of client. Will wait to hear back.

Sent information by mail to client. Will wait to hear back.

# Printing Case Notes, cont.

- Main Menu -> Reports -> Multiple Client Case Notes Report
- ALL ACTIVE CLIENTS being served by your agency will appear in the client list.
  - If your client's enrollment status has been set to anything other than "active," the client will NOT appear.

## Multiple Client Case Notes Reports Se...

From this screen you can print Case Notes Reports for multiple active clients.

Case Notes Date Span

From : 6/9/2010

Through : 6/9/2011

Sort By

☒ Last Name, First Name

☐ Date

Last Name:	First Name:	Client ID:
<input type="checkbox"/> Kelly	Grace	
<input type="checkbox"/> Pokey	Hokey	
<input type="checkbox"/> Testrecord	Test	

Select All

Deselect All

Print

Cancel

# Printing Case Notes, cont.

1. Set the date span for the notes you wish to print.
2. Check the box(es) for any client(s) whose notes you want to print.
3. Click “Print” and you will be brought to a screen where you can preview the notes. From here, you can copy, export, or print the case notes.

# Services

- A single contact with or on behalf of a client may have multiple related services. To log all services related to a contact, select the tab labeled “Services.”
- The screen will look somewhat like this:

[illegible]

# Services fields required for Part B reporting:

- Enrl Status
- Enrl Date
- Deceased Date or Case Closed date for discharged clients



# Services

- If this is a new client, make sure you enter the client's status information and enrollment (intake) date at the top of the screen.
  - The defaults are a Vital Status of "Alive" and an Enrollment Status of "Active." It's possible for a client to be deceased and still be an active case, as you may still be doing case management, charting, etc. for a deceased client.
  - Once the Enrollment Status is set to "Inactive/Case Closed," you can't enter any more services without resetting the Enrollment Status to "Active."
  - The Enrollment Date should be the date of intake. *Note that the enrollment year is used by CAREWare for the Ryan White Program Data Report to determine if this client is new in the current year or not.*
- Please also note that you can only view services for one year at a time. If you need to view/edit/enter services for a prior year, you must change the year selected in the pull-down next to the client's status.

The screenshot shows the 'Client Information' window in the CAREWare software. The client's name is 'Pokey, Hokey'. At the top, there are buttons for 'Change Log', 'Client Report', 'Delete Client', 'Find List', 'New Search', and 'Close'. Below these are tabs for 'Demographics', 'Services', 'Annual Review', 'Encounters', 'Relations', 'QA', 'Income Verification', 'Releases', and 'Housing Status'. The 'Services' tab is currently selected. A section for status and dates is highlighted with a black box. It contains the following fields: 'Year:' with a dropdown menu showing '2006'; 'Vital Status:' with a dropdown menu showing 'Alive'; 'Deceased Date:' with an empty date field; 'Enrl Status:' with a dropdown menu showing 'Active'; 'Enrl Date:' with an empty date field; and 'Case Closed:' with an empty date field. Below this section is the 'Add/Edit Service Details' section, which includes fields for 'Date:', 'Service Name:', 'Contract:', 'Units:', 'Price:', and 'Total:', each with its own input field or dropdown menu.

# Enter a New Service

- Once you click “Add Service” the service line will become active.

Add/Edit Service Details

Date:	Service Name:	Contract:	Units:	Price:	Cost:
3/23/2011	1100 Referral and Linkage to Service in Care Plan	test	2	\$0.00	\$0.00

Provider	Adherence Time in Units	Prevention Time in Units
DB ADMIN	1	0

Travel in Units
4

# Editing Services

**Add/Edit Service Details**

Date:	Service Name:	Contract:	Units:	Price:	Cost:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Date:	Service Name:	Units:	Total:	Provider	Subservice Specific Custom Data:
4/3/2007	8200 One-to-One Contact with Resident	1	\$0.00	CRMA	Lisa Sanborn
4/3/2007	8210 Community Linkage	2	\$0.00	CRMA	Louis Salvato

Select a previously entered service and double click on it, or select "Edit Service."

Service Sharing
New Service
Edit Service
Delete Service

Select a previously entered service and double click on it, or select "Edit Service."

When the previously logged service opens, the entry will edit faster if you click on the "Services" tab before you edit the entry. When you are done, click "Save." If you need to edit another entry for the same client, click on the "Services" tab before selecting the next entry.

# Services Required by Part B

Code	Service Name	Units	Definition
1000	Care Plan	1 unit = 15 minutes	This service should be logged when a case manager completes a care plan with the client.
1200	Referral and monitoring service from care plan	1 unit = 15 minutes	This service should be logged when a case manager coordinates a referral for a client, facilitates the client's link to a service identified in the care plan, follows up to ensure that a client has received a service identified on the care plan, or screens for barriers related to accessing a service identified on the care plan. This includes collateral contacts.
1300	Comprehensive assessment	1 unit = 15 minutes	This service should be logged when a case manager completes an intake, re-intake, or annual assessment.

# Services Required by Part B

Code	Service Name	Units	Definition
1400	Temporary coordination for institutionalized client	1 unit = 15 minutes	This service should be logged for time-limited assistance with coordinating a client's transition into or out of institutionalized care (including hospitals, assisted living, rehabilitation facilities, and correctional facilities) as long as these services relate to the client's care plan and needs identified on the assessment. This includes collateral contacts.
1800	Discharge	1 unit	This service should be logged when a client is discharged from Part B case management.

**NOTE:** These two services are not billable to MaineCare and will be filtered out of any unit billing reports in CAREWare

# NOT Services

- CMs may want to document some activities in case notes that are not considered services, including:
  - Phone messages
  - Letters, other mailings, e-mails
  - Dispensing assistance or dropping items at a client's house (outside of a home visit)
  - Picking up items for a client (food, prescriptions, etc)
  - Scheduling case management visits without working on a care plan goal
- **Do NOT log a service in CAREWare for these activities**

# NOT Services

- REMINDER: If an activity does not relate to a care plan goal and a need identified on the assessment, **it is not a service**

# Paperwork

- Part of a service when supports care plan goal and
  - CM is working directly with client to complete it (e.g. assessment)
  - Accessibility
    - Client is illiterate, has language barriers, physical incapacity
  - Emergency involving loss of health insurance
- NOT a service when not one of these 3 things



# How to Log Travel Time

- Enter the total amount of time spent traveling to and from the appointment, if any, in the “Travel in Units” box.
- **This time should NOT be included in the “Units” box.**
- A unit is 15 minutes.

Add/Edit Service Details

Date:	Service Name:	Contract:	Units:	Price:	Cost:
3/23/2011	1100 Referral and Linkage to Service in Care Plan	test	2	\$0.00	\$0.00

Provider	Adherence Time in Units	Prevention Time in Units
DB ADMIN	1	0

Travel in Units
4

# How to Log an Assessment

- Service 1300 Comprehensive Assessment is logged like most other services, but it also includes an extra box to identify the type of assessment and acuity score.

Add/Edit Service Details

Date:	Service Name:	Contract:	Units:	Price:	Cost:
12/5/2011	1300 Comprehensive Assessment	test	6	\$0.00	\$0.00

Provider	Assessment Type	Acuity Score
DB ADMIN	Annual	12

Travel in Units

2

# How to Log an Assessment

- For type of assessment:
  - Select “Intake” if the client is accessing case management with your agency for the first time.
  - Select “Reintake” if the client has been discharged from services with your agency for one year or more.
  - Select “Annual” if this is the routine annual assessment of an active client.
- For acuity score, enter the **total** acuity score for the client from the assessment document:

Acuity Assessment					
Area	0 pts Client identifies no needs in this area	1 pt Client identifies low needs in this area	2 pts Client identifies moderate needs in this area	3 pts Client identifies high needs in this area	4 pts Client is in crisis in this area
1. Access					
2. Housing					
3. Food/Nutrition					
4. Transportation/Home Care					
5. Education/Employment/Financial Support					
6. Treatment Adherence					
7. Dental Care					
8. Mental Health/Social Support					
9. Substance Use					
10. Relationships					
11. Legal					
12. Other					

Total Acuity Score: \_\_\_\_\_

# How to Log a Client Certification

- Service 1100 Client certification is logged like most other services, with required fields for travel time. **In addition, you must document the client's care status.**

Add/Edit Service Details

Date:	Service Name:	Contract:	Units:	Price:	Cost:
11/17/2011	1100 Client certification	test	6	\$0.00	\$0.00

Provider	Care Status	Travel in Units
	<div>In Care</div> <div>Out of Care</div>	

# How to Log a Client Certification

- Documenting Care Status:
- Care Status is determined when completing the “Care Status Tracking” section of the Semi-Annual Client Certification form.
- A client is “**In Care**” if:
  - Client has seen a doctor within the last six months, **OR**
  - Client has had a CD4 and/or Viral load in the last six months, **OR**
  - Client is taking meds
  - Otherwise, select “Out of Care”

# Discharges

- Discharging clients in CAREWare is still a 3-or 4-step process
  - Service Code # 1800
    - No longer need to indicate Discharge Type on service entry**

Add/Edit Service Details

Date:	Service Name:	Contract:	Units:	Price:	Cost:
1/24/2012	1800 Discharge	test	1	\$0.00	\$0.00

Provider: DB ADMIN

# Discharges

2. At the top of the screen, change the client's Vital Status (if appropriate).
  - If the client has died, the Deceased Date box will become active and you must enter the date of death.

The screenshot shows a software interface with the following elements:

- Tabs:** Demographics, Services, Annual Review, Encounters, Referrals, HIV C&T, Relations, QA, Inc.
- Fields:**
  - Year: 2007
  - Vital Status: Alive (dropdown menu is open showing options: Alive, Deceased, Unknown)
  - Deceased Date: (empty field, active)
  - Enrl Status: Inactive/Cas
  - Enrl Date: 6/1/2005
  - Case Closed: 6/25/2007
- Buttons/Fields:** Add/Edit S, Date, Name, Contract.

# Discharges

## 3. Update the Enrollment Status

**Testrecord, Test**

Appointments	Orders	Forms	Change Log	Client Report	Merge Client	Delete Client	Find List	New Search	Close
Demographics	Service	Annual Review	Encounters	Relations	QA	Medical and Insurance			

Year: 2013 Vital Status: Alive Deceased Date: Enrl Status: Unknown Enrl Date: 6/9/2011 Case Closed:

Add/Edit Service Details

Date:	Service Name:	Contract:	Units:	Price:	Cost:

Active  
Unknown  
Referred or Discharged  
Removed  
Incarcerated  
Relocated



# Enrollment Status

- *Referred or Discharged*—The client was referred to another program or services and will not continue to receive services at this agency; the client became self-sufficient and no longer needed Ryan White Program-funded services; the client voluntary left your program; or the client refuses to participate.
- *Removed*—The client was removed due to violation of rules.
- *Incarcerated*
- *Relocated/Moved*
- *Unknown*—The client has been “lost to care.”

# Discharges

4. Lastly, make sure you go to the QA screen and change the CM assigned to “Discharged”
  - If another agency is serving that client, it is up to them to make sure that the CM is accurately reflected

# Annual Review

- All of the Annual Review fields should be entered at intake and reviewed/updated at least during each SemiAnnual Certification
- The following Annual Review fields are required for Part B reporting:
  - Primary Insurance
  - Primary HIV Medical Care
  - Housing/Living Arrangement
  - Household Income
  - Household Size

# Annual Review/Annual

Client, New

Appointments

Orders

Forms

Change Log

Client Report

Merge Client

Delete Client

Find List

New Search

Close

Demographics

Drug Services

Insurance Services

Annual Review

Encounters

Referrals

HIV C&T

Pregnancy

Relations

Custom Tab 1

Custom

Annual

Annual RSR View

Annual Custom Fields

Quarterly

Summary Data as of

11/14/2012

Bring Forward

Insurance

11/9/2012

Primary Insurance: Medicare Part A/B

Other Insurance: Medicare Part D - Full LIS

Federal Poverty Level

3/6/2012

Household Income: \$37,000.00

Household Size: 4

Poverty Level: 161%

Annual Screening

HIV Primary Care

Housing Arrangement

HIV Risk Reduction Counseling

Mental Health

Substance Abuse

Insurance

Add

Edit

Delete

Search

1 / 1

Date	Primary Insurance	Other Insurance	High-Risk Pool
11/9/2012	Medicare Part A/B	Medicare Part ...	True

# Entering Annual Review Info

Annual | Annual RSR View | Annual Custom Fields | Quarterly

Summary Data as of 11/14/2012 Bring Forward

**Insurance** 11/9/2012

Primary Insurance: **Medicare Part A/B**

Other Insurance: **Medicare Part D - Full LIS**

**Federal Poverty Level** 3/6/2012

Household Income: **\$37,000.00**

Household Size: **4** Poverty Level: **161%**

**Annual Screening**

HIV Primary Care

Housing Arrangement

HIV Risk Reduction Counseling

Mental Health

Substance Abuse

**Insurance** [Add](#) [Edit](#) [Delete](#)

Search 1 / 1

Date	Primary Insurance	Other Insurance	High-Risk Pool
11/9/2012	Medicare Part A/B	Medicare Part ...	True

1. Click an area on this side of the screen

2. Entries related to that area will appear on this side of the screen.

3. Add, edit, or delete entries by clicking the links above.

# Entering Annual Review Info

- **DO NOT** try to add records by clicking the plus sign that appears in the boxes on the left. There is a bug in the system that edits and deletes records when clicking the plus sign. Always add records by clicking the link labeled “Add” on the right.
- If you click the link labeled “Add,” a new, light blue box will appear to enter the information for that category with a date and save it.
- You will notice that the drop-down menus are limited. This is because these fields are tied specifically to federal reporting.

# Insurance

- One of the primary purposes of medical case management
- Make sure information gets updated
- Must select primary insurance AND all other insurances

# Insurance

- Any time a client experiences a change in insurance (primary or other types), you should add a new insurance record.
  - Select “Insurance” on the left.
  - Click the link labeled “Add” on the right.
  - The light blue box will pop up on the right.
- Enter the date of the change (most likely the date you are entering the information). Select the client’s primary insurance type – the medical insurance that provides the most reimbursement. Then check the boxes for all other insurance types that apply.

The screenshot shows a software window titled "Insurance" with "Add", "Edit", and "Delete" buttons in the top right. A light blue "Insurance Assessment" dialog box is open. It contains a "Primary Insurance:" dropdown menu, a "Date:" dropdown menu set to "11/14/2012", and a section for "Other Insurance" with checkboxes for "Private", "Medicare Part A/B", "Medicare Part D", "Full LIS", "Medicare (Part unspecified)", "Other", "Medicaid", "Other Public", "No Insurance", and "Unknown". There is also a checkbox for "High Risk Insurance Pool" at the bottom. "Save" and "Cancel" buttons are at the bottom right of the dialog box.



# Household Size and Income

- Client and legal spouse and/or other legal dependents
- Otherwise, household size is 1
- This definition may be different from other programs, such as HAVEN and MaineCare. Always enter info based on this definition.
- “Household Income” should reflect the income for all of the people counted in “Household Size.”

# Entering Household Size & Income

- When the income has been verified, select “Federal Poverty Level” on the left and the link labeled “Add” on the right. A light blue box will pop up.
- Enter the date of the most recent verifying document as the date, then update the household income and household size as appropriate.

The screenshot shows a web application interface for the Federal Poverty Level. At the top, there is a title bar with 'Federal Poverty Level' and three buttons: 'Add', 'Edit', and 'Delete'. Below this is a search bar with the text 'Search' and a page indicator '2 / 2'. A table with four columns is displayed: 'Date', 'Household Income', 'Household Size', and 'Poverty Level'. The table contains two rows of data. Below the table, a light blue modal box titled 'Poverty Level Assessment :' is open. It contains four input fields: 'Household Income:', 'Date:', 'Household Size:', and 'Poverty Level:'. The 'Date:' field has a dropdown menu showing '11/14/2012'. The 'Poverty Level:' field shows '0%'. At the bottom of the modal box are two buttons: 'Save' and 'Cancel'.

Date	Household Income	Household Size	Poverty Level
3/6/2012	\$37,000.000	4	161.00%
2/1/2012	\$37,000.000	3	194.00%

Poverty Level Assessment :

Household Income:

Date:

Household Size:

Poverty Level: **0%**

# Housing/Living Arrangement

Demographics | Service | Annual Review | Encounters | Relations | QA | Medical and Insurance

Annual | Annual RSR View | Quarterly

Summary Data as of 4/12/2013 Bring Forward

**Insurance** 3/29/2013

Primary Insurance: **Medicaid**

Other Insurance:

**Federal Poverty Level** 3/12/2013

Household Income: **\$25,000.00**

Household Size: **2** Poverty Level: **161%**

**Annual Screening**

HIV Primary Care	3/12/2013
<b>Private practice</b>	
Housing Arrangement	3/12/2013
<b>Stable/Permanent</b>	
HIV Risk Reduction Counseling	

**Annual Screening** Add Edit Delete

4 / 4

Date	Screening	Result	Action
3/12/2013	HIV Primary Care	Private practice	
3/12/2013	Housing Arrang...	Stable/Perman...	
12/31/2011	HIV Primary Care	Private practice	
12/31/2011	Housing Arrang...	Stable/Perman...	

Annual Screening :

Date : 4/12/2013

Type :

Result :

- HIV Primary Care
- Housing Arrangement**
- HIV Risk Reduction Counseling
- Mental Health
- Substance Abuse

Save Cancel

When you select one of the "Annual Screenings" on the left and click "Add" on the right, the light blue box that appears looks like this:

# Housing/Living Arrangement

- When you select “Housing Arrangement” as the type of screening, you will see the following options for “result”
- See the next two slides for important definitions

The screenshot shows a software interface for 'Annual Screening'. At the top, there are buttons for 'Add', 'Edit', and 'Delete'. Below these is a table with four columns: 'Date', 'Screening', 'Result', and 'Action'. The table contains four rows of data. Below the table, there is a form for entering a new screening. The form has three fields: 'Date' (set to 4/12/2013), 'Type' (set to Housing Arrangement), and 'Result' (which is currently open, showing a list of options). The 'Result' dropdown menu includes the following options: Institution, Non-permanently Housed, Other, Stable/Permanent, Temporary, Unknown, and Unstable.

Date	Screening	Result	Action
3/12/2013	HIV Primary Care	Private practice	
3/12/2013	Housing Arrang...	Stable/Perman...	
12/31/2011	HIV Primary Care	Private practice	
12/31/2011	Housing Arrang...	Stable/Perman...	

Annual Screening :  
Date : 4/12/2013  
Type : Housing Arrangement  
Result :  
Institution  
Non-permanently Housed  
Other  
Stable/Permanent  
Temporary  
Unknown  
Unstable

# Housing/Living Arrangement

- There's a difference between *Nonpermanent Housing* and *Unstable Housing*
- *Nonpermanent Housing* includes:
  - Transitional housing
  - Temporarily staying with friends or family (couch surfing)
  - Hotel or motel (not paid for with emergency shelter voucher)
  - Other temporary arrangement
- *Unstable Housing Arrangements* include:
  - Emergency shelter
  - Place not designed for, or ordinarily used as, a regular sleeping accommodation for people (vehicle, abandoned building, bus/train station/airport)
  - Hotel or motel paid for with emergency shelter voucher

# Institution

- Although there is an option for “institution” in the Housing/Living Arrangement, **you should not use this option**
- Instead use:
  - ***Stable Permanent Housing*** for institutional setting with greater support and continued residence expected (psychiatric hospital or other psychiatric facility, foster care home or foster care group home, or other residence or longterm care facility)
  - ***Nonpermanent housing*** for temporary placement in an institution (e.g., hospital, psychiatric hospital, or other psychiatric facility, substance abuse treatment facility, or detoxification center)
  - ***Unstable Housing*** for jail, prison, or a juvenile detention facility

# HIV Primary Care

- Like housing, when you select “HIV Primary Care” as the type of screening, you will see the following options for “result”

**Annual Screening** Add Edit Delete

4 / 4

Date	Screening	Result	Action
3/12/2013	HIV Primary Care	Private practice	
3/12/2013	Housing Arrang...	Stable/Perman...	
12/31/2011	HIV Primary Care	Private practice	
12/31/2011	Housing Arrang...	Stable/Perman...	

Annual Screening :

Date : 4/12/2013

Type : HIV Primary Care

Result :

- Emergency Room
- Hospital outpatient center
- No primary source of care
- Other
- Private practice
- Publicly-funded clinic or health dept.
- Unknown

# Entering Labs

- Part B case managers are required to collect clients' CD4 and Viral Load test results during the SemiAnnual Certification process. These lab results must be entered into CAREWare through Encounters | Labs.



# Entering Labs

- On the Labs screen, click the button labeled “Rapid Entry”

The screenshot shows a medical software interface with a top navigation bar containing tabs: Demographics, Service, Annual Review, Encounters, Relations, QA, and Medical and Insurance. Below the navigation bar, there is a section for 'Encounter Date' with a dropdown menu showing '02/17/2012 | Test'. To the right of the date are buttons for 'Create Encounter', 'Delete Encounter', 'Encounter Report', and 'Sharing Options'. Below this is a checkbox labeled 'Only show data for this provider' which is checked. The main section is titled 'Labs' and has a sub-tab 'Case Note'. Under the 'Labs' tab, there is a 'Rapid Entry' button and a 'Setup' button. Below these buttons is a form for 'Add/Edit' with fields for 'Current Test' (a dropdown menu), 'Result' (a dropdown menu), and a 'Save' button. Below the form is a table with columns: Test, Date of Prior Test, Prior Result, Current Result (02/17/2...), Provider, and Comment. A red arrow points to the 'Rapid Entry' button.

Test	Date of Prior Test	Prior Result	Current Result (02/17/2...	Provider	Comment
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# Entering Labs

- The rapid entry screen looks like this:

**Labs Rapid Entry**

Client:

☐ Only show this provider

From:

Through:

Primary Filter:

Secondary Filter:

☒ Show all Labs (no chart)

Test:

Date:  Result:

Comment:

Save Cancel

Test	Date:	Result	Provider:	Comment	Data So...	Test Stat
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Add Edit Delete Image HL7Source

- Click the button labeled “Add” at the bottom of the screen.

# Entering Labs

- The “Test” box will become active. Select the type of test, enter the date of the lab, enter the result, click “Save.”

Test:

CD4 Count  
Viral Load

Comment:

Save

Cancel

Test	Date:	Result	Provider:	Comment	Data So...	Test Stat
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# QA tab

## Testrecord, Test

Appointments	Orders	Forms	Change Log	Client Report	Merge Client	Delete Client	Find List	New Search		
Demographics	Drug Services	Service	Annual Review	Encounters	Referrals	HIV C&T	Pregnancy	Relations	QA	Medical and Insurance

CM assigned:

Income Date:

SSN:

Subsidy Type:

Chronic Homelessness:

☐ Domestic Violence Survivor ☐ Veteran

Incarceration:

Country of Origin:

Subculture:

Languages:

# QA fields required for Part B reporting:

- CM Assigned
- Income Date
  - Income date must be less than one year old for all active Part B clients.

# Medical and Insurance tab

## Testrecord, Test

Appointments	Orders	Forms	Change Log	Client Report	Merge Client	Delete Client	Find List	New Search	Close				
Demographics	Drug Services	Service	Annual Review	Encounters	Referrals	HIV C&T	Pregnancy	Relations	QA	Medical and Insurance	F	◀	▶

Part C	MD Name	PI Plan Name
Regional Medical Center at Lubec	Dr Doolittle	Private Plan

PI Plan No.	Medicare Number	Part D Plan Name	Part D Plan No.
ABC11111111	123456789A	Drug Plan	5555555ABC

MaineCare Type	MaineCare Number	MaineCare Review	ADAP ID	ADAP status
full benefit	12345678A	3/26/2010	dhhs12345	Inactive

ADAP Type	ADAP Effective Date	ADAP End Date	ADAP Release Expiration
DHSDU	1/1/2001	1/24/2013	1/24/2013

# Medical & Insurance fields required for Part B reporting:

- Part C
- MD Name
- All insurance information that applies
- NOTE: All fields related to ADAP are to be updated by ADAP staff ONLY

# Medical and Insurance tab

## Testrecord, Test

Appointments	Orders	Forms	Change Log	Client Report	Merge Client	Delete Client	Find List	New Search	Close	
Demographics	Drug Services	Service	Annual Review	Encounters	Referrals	HIV C&T	Pregnancy	Relations	QA	Medical and Insurance

Part C	MD Name	PI Plan Name
Regional Medical Center at Lubec	Dr Doolittle	Private Plan

PI Plan No.	Medicare Number	Part D Plan Name	Part D Plan No.
ABC11111111	123456789A	Drug Plan	5555555ABC

MaineCare Type	MaineCare Number	MaineCare Review	ADAP ID	ADAP status
full benefit	12345678A	3/26/2010	dhhs12345	Inactive

ADAP Type	ADAP Effective Date	ADAP End Date	ADAP Release Expiration
DHSDU	1/1/2001	1/24/2013	1/24/2013

**NEVER MAKE CHANGES TO ADAP FIELDS.**

You may edit other information on this screen. If you notice anything incorrect in ADAP fields, contact ADAP to make the change. **If you make changes to ADAP fields, you may cause errors that could jeopardize a client's ability to receive meds!**

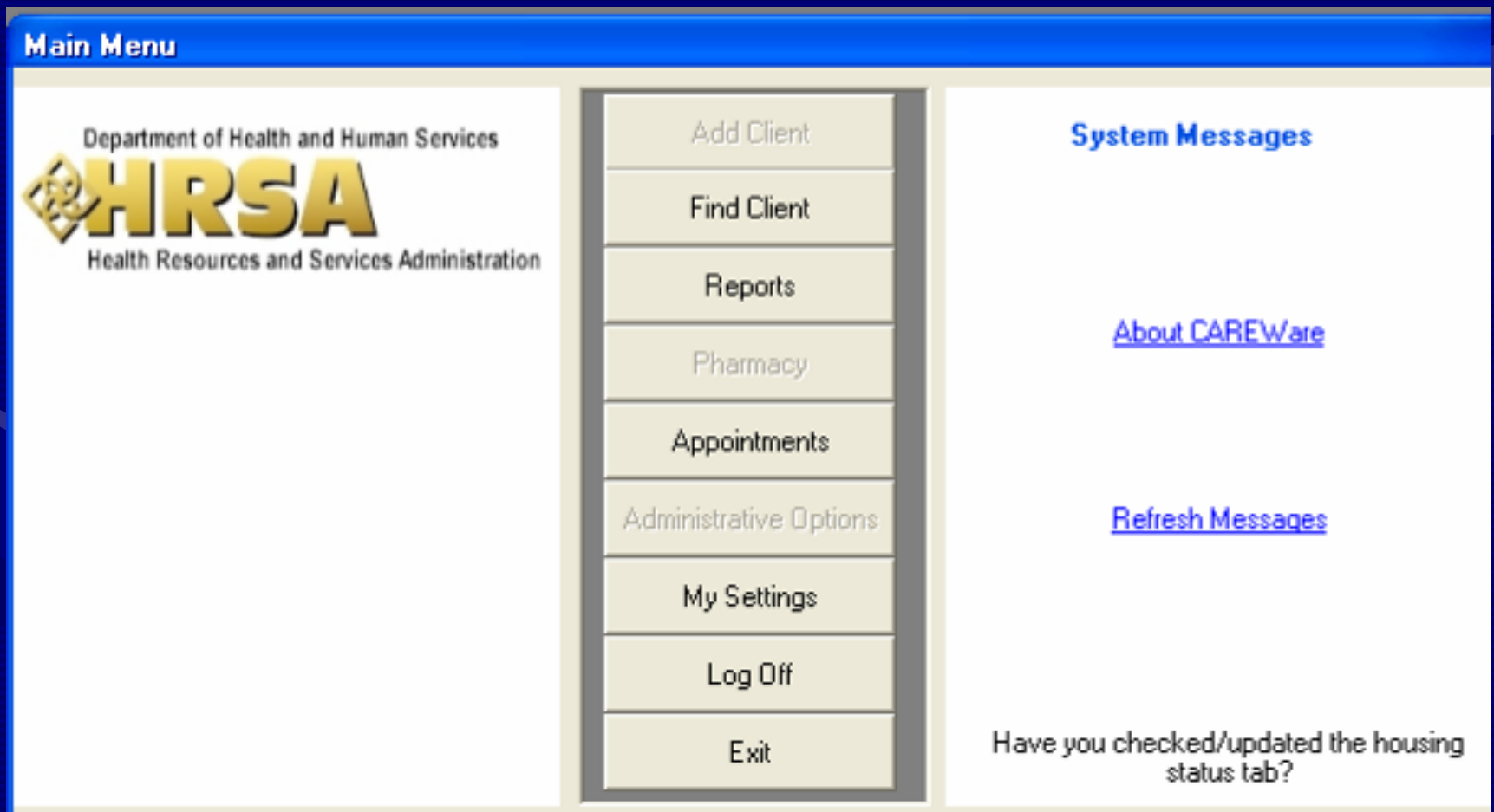


# Logging Out



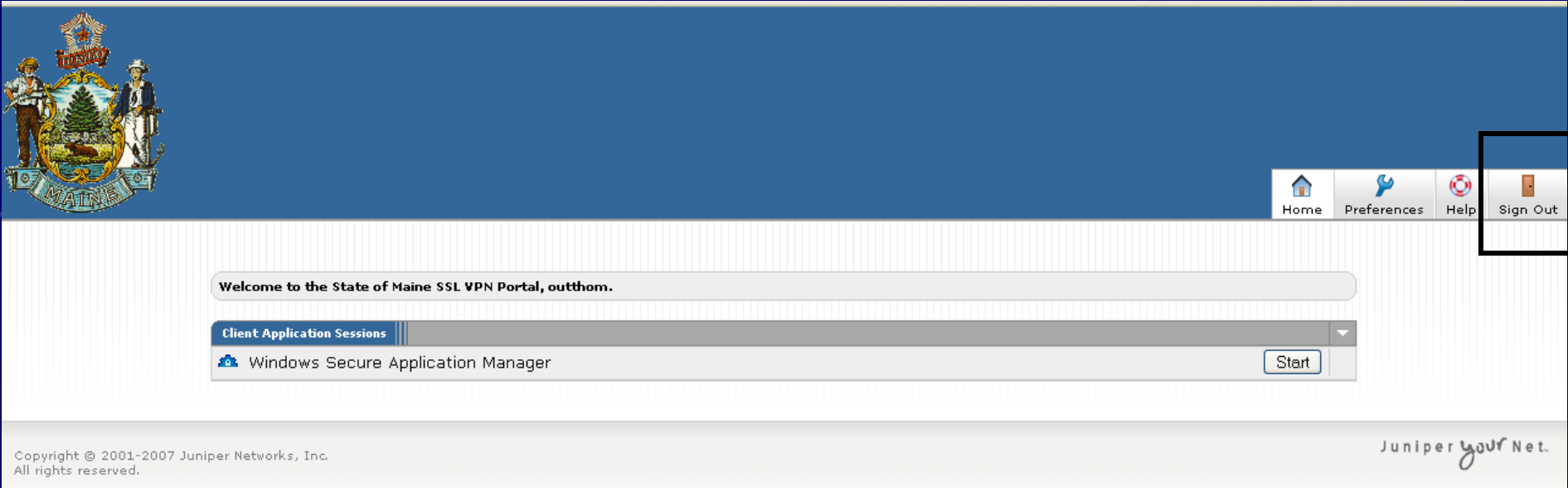
# CAREWare

- Close the window you've been working in
- From the main menu, select "Exit"



# State Server

- When you have finished using CAREWare, exit from the program by selecting Exit from the main menu.
- Maximize your web browser by selecting it from your task bar.
- Click “Sign Out” from the web page that appears.



- A message will appear telling you that your session has ended and to close your web browser.